



COUNTY OF SAN DIEGO  
**Great Government Through the General Management System – Quality, Timeliness, Value**  
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

RETIREMENT MEMBER SERVICES CLERK	Class No. 007555
RETIREMENT MEMBER SERVICES ASSOCIATE	Class No. 007558
RETIREMENT MEMBER SERVICES SPECIALIST	Class No. 007556

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■ CLASSIFICATION PURPOSE

To perform specialized employment benefits (pension and health insurance programs) administration; to process related personnel records and payroll transactions; to provide benefit information, and to perform related work as required.

■ DISTINGUISHING CHARACTERISTICS

These classes are allocated only to the San Diego County Employees Retirement Association (SDCERA). Incumbents are designated as "confidential employees" and process confidential personnel, retirement, medical, and legal documents; and may participate in the county's labor relations process and planning related to employment benefits negotiations.

Retirement Member Services Clerk:

This is the entry-level class. Under direct supervision, performs retirement benefit and administrative support work of average difficulty and performs routine personnel duties.

Retirement Member Services Associate:

This is the journey-level class. Under general supervision, this class is responsible for performing retirement benefits administration work involving the interpretation of pension benefit rules, health insurance contracts, and related regulations, policies, and procedures; and resolves the more complex member issues.

Retirement Member Services Specialist:

This is the lead-level class. Under general direction, this class provides technical training, and assigns, schedules and reviews the work of assigned staff; performs the more difficult and complex interpretation of retirement/benefit law; leads workshops and presentations for active and retired members.

■ FUNCTIONS

**The examples of functions listed in the class specifications are representative but not necessarily exhaustive or descriptive of any one position in the classes. Management is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position.**

RETIREMENT BENEFITS ADMINISTRATION

Essential Functions:

1. Enrolls new hires in the retirement system.
2. Processes pension, disability, and health insurance applications.
3. Calculates benefit payouts and costs for service credit purchases.
4. Maintains electronic personnel files and member accounts.
5. Verifies payments, contributions and deductions.
6. Communicates information to County departmental personnel/payroll staff, current employees, retirees, and beneficiaries who are general or safety members of the Retirement Association.
7. Resolves benefit issues and problems.
8. Clarifies the Consolidated Omnibus Budget Reconciliation Act (COBRA) benefits to retiring employees.

9. Processes death benefits.
10. Conducts the annual open enrollment process for the health insurance plans.
11. Monitors and reconciles employee/member accounts, payroll checks, rate schedules, contributions, service credits, personal information, retirement/deferred status, reciprocity, and dissolution of marriage orders.
12. Explains earnings, deductions, taxes and other withholding information.
13. Prepares and mails 1099 forms .
14. Establishes electronic fund transfers and paycheck deposits.
15. Obtains birth and death certificates .
16. Processes address, beneficiary and other record changes .
17. Maintains technical desk manuals and related forms .
18. Provides courteous, high quality service to members of the public by personally responding to requests for service or making appropriate referral.

#### DISABILITY RETIREMENT ADMINISTRATION

##### Essential Functions:

1. Receives and coordinates the processing of retirement disability applications received from county appointing authorities and/or employees.
2. Obtains and evaluates medical and legal documents and records, including personnel files, and payroll history.
3. Processes information requests and subpoenas to health care providers, including employee personal physicians and the Department of Human Resources workers' compensation unit.
4. Opens and maintains case files.
5. Distributes mail and forwards documents for electronic imaging.
6. Provides courteous, high quality service to members of the public by personally responding to requests for service or making appropriate referral.
7. Assists in scheduling and preparing for legal administrative hearings.
8. Calculates disability benefits.
9. Prepares and mails 1099 forms .
10. Maintains related logs, spreadsheets, and databases .
11. Prepares information and reports to be docketed with the Board of Retirement.
12. Maintains technical desk manuals and related forms .

#### MEMBER COMMUNICATIONS ADMINISTRATION

##### Essential Functions:

1. Responds to member questions and requests for forms, information, and assistance.
2. Prepares correspondence, and clarifies policy and procedures.
3. Communicates benefit coverage and health plan changes.
4. Assists members in navigating the SDCERA website to obtain information and forms and to use benefit calculators.
5. Explains service credit purchase, vesting, and reciprocity.
6. Plans and schedules retirement benefits workshops and new -hire orientation.
7. Conducts information presentations.

8. Calculates projected benefit payouts.
9. Prepares and distributes handouts for employees and departmental personnel and payroll staff.
10. Greets and receives callers at reception desks.
11. Prepares regular mass mailings to association members.
12. Maintains technical desk manuals and related forms.
13. Provides courteous, high quality service to members of the public by personally responding to requests for service or making appropriate referral.

#### ADMINISTRATIVE SUPPORT SERVICES

##### Essential Functions:

1. Prepares and processes requisitions for services, supplies, and equipment.
2. Receives and checks orders and maintains office supplies.
3. Researches costs and vendors.
4. Processes requests for payments.
5. Maintains internal records, logs, rosters, spreadsheets and databases.
6. Assists in processing employee timesheets and maintains related payroll/personnel files.
7. Assists in planning and scheduling department activities and training.
8. Performs reception duties.
9. Sorts and processes mail.
10. Maintains desk reference manuals and related forms and resources .
11. Provides courteous, high quality service to members of the public by personally responding to requests for service or making appropriate referral.

#### ■ KNOWLEDGE, SKILLS, AND ABILITIES

##### Knowledge of:

The following apply to all classes:

- Employment benefit plans and related administrative procedures.
- Mathematics and basic statistics
- SDCERA internal policies, operating and administrative procedures, and forms.
- Customer service and public contact methods and techniques; interviewing and benefits counseling techniques.
- Process improvement methods and techniques.
- Business English including spelling, grammar and punctuation.
- Telephone, office, and online etiquette.
- County customer service objectives and strategies.

##### Retirement Member Services Associate (in addition to the above):

- Provisions of the California government code (County Employees Retirement Law of 1937).
- On-the-job training techniques.
- Methods to review and check work for accuracy and completeness.
- Federal and state regulations related to payroll earnings, withholding for taxes and other deductions, garnishments, Medicare/social security, COBRA and ERISA.

##### Retirement Member Services Specialist (in addition to the above):

- Principles of supervising including; planning and scheduling work; training; establishing goals; managing and reviewing performance; and counseling.

Skills and Abilities to:

The following apply to all classes:

- Plan, organize, and prioritize work
- Distinguish importance of tasks and complete work assignments in proper sequence and within deadlines.
- Check information, forms, files, and accounts for accuracy and completeness; process corrections, adjustments, and changes.
- Maintain and update detailed desk manuals.
- Enter, retrieve, and update data in a benefits (pension and health insurance) system database, human resources information system, payroll system, and electronic (imaged) personnel files.
- Receive and assist callers.
- Research and explain information and resolve issues, problems, and complaints.
- Read, interpret, understand, apply, and explain to others provisions of employment benefit laws, requirements, reference materials, and operating policy and procedures.
- Operate business/office equipment.
- Compile information for distribution and mailings.
- Maintain confidentiality of personnel, payroll, medical, and legal records.
- Compose and prepare letters in order to respond to correspondence.
- Operate a personal computer with proficiency using Word, Excel, Outlook, and Internet Explorer.
- Communicate effectively with a variety of individuals representing diverse cultures and backgrounds and function calmly in challenging situations, which require a high degree of sensitivity, tact and diplomacy.
- Compile payroll history including researching computer data bases, microfilm, microfiche, and payroll time cards to establish salary, time and leave records in a complex civil service system with multiple components of pay and complex pay differentials and shift operations.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or referral.
- Provide prompt, efficient and responsive service.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.

Retirement Member Services Specialist (in addition to the above):

- Deliver presentations.
- Conduct training seminars, and speak before large and small groups.
- Conduct technical training.
- Plan, assign and review subordinate work.
- Counsel employees.
- Assist in developing, improving, and writing internal policy, procedures, and forms.
- Maintain up-to-date communication materials for members of the retirement association.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills, and abilities listed above. Examples of qualifying education/experience are:

Retirement Member Services Clerk:

1. At least one year of office clerical, secretarial, or employee benefits processing experience with responsibility for providing customer services; filing and maintaining records; performing accurate arithmetic calculations; explaining policy, procedures, and forms; and using a personal computer, OR
2. A bachelor's degree from an accredited college or university in public or business administration, accounting, human resources management, or a related field, OR
3. Professional designation as a Certified Employee Benefit Specialist (CEBS).

Retirement Member Services Associate:

1. At least one year of experience as a Retirement Member Services Clerk with SDCERA or equivalent duties with another retirement/benefits organization or human resources/personnel operation, OR
2. At least eighteen months experience determining, processing, interpreting and explaining employee benefits such as retirement or pension plans, health insurance, workers compensation or life insurance, AND performing related computations, reconciliations, and payroll transactions and adjustments, OR
3. A bachelor's degree from an accredited college or university in public or business administration, accounting, human resources management, or a related field, AND six (6) months of experience determining, processing, interpreting, and

explaining employee benefits such as retirement or pension plans, health insurance, workers' compensation, or life insurance, AND performing related computations, reconciliations, and payroll transactions and adjustments, OR

4. Professional designation as a Certified Employee Benefit Specialist (CEBS), AND six (6) months of experience determining, processing, interpreting, and explaining employee benefits such as retirement or pension plans, health insurance, workers' compensation, or life insurance, AND performing related computations, reconciliations, and payroll transactions and adjustments.

#### Retirement Member Services Specialist:

1. At least two years of experience as a Retirement Member Services Associate with SDCERA or equivalent duties with another retirement/benefits organization or human resources/personnel operation, OR
2. At least three years of customer service experience determining, processing, interpreting, and explaining employee benefits such as retirement or pension plans, disability and death benefits, health insurance, workers compensation or life insurance; AND performing related computations, reconciliations, and payroll transactions and adjustments, OR
3. A bachelor's degree from an accredited college or university in public or business administration, accounting, human resources management, or a related field, AND two (2) years of experience determining, processing, interpreting, and explaining employee benefits such as retirement or pension plans, disability and death benefits, health insurance, workers' compensation, or life insurance, AND performing related computations, reconciliations, and payroll transactions and adjustments, OR
4. Professional designation as a Certified Employee Benefits Specialist (CEBS), AND two (2) years of experience determining, processing, interpreting, and explaining employee benefits such as retirement or pension plans, disability and death benefits, health insurance, workers' compensation, or life insurance, AND performing related computations, reconciliations, and payroll transactions and adjustments.

#### Notes:

1. Previous experience in a California CERS, PERS, or STRS system or a similar defined benefit system in a public agency or municipal retirement system or bonafide retirement plan is highly desirable.
2. Completion of California Association of Public Retirement Systems (CALAPRS) Overview and Basic training courses or one module of CEBS series is highly desirable.

#### ■ ESSENTIAL PHYSICAL CHARACTERISTICS

**The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classifications. Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.**

Continuous upw ard and downward movement of the neck. Frequent: sitting, repetitive use of hands to operate computers, printers and copiers. Occasional: walking, standing, bending and twisting of neck, bending and twisting of waist, squatting, simple grasping, reaching above and below shoulder level. Some positions may require the ability to perform moderate lifting up to 20 lbs.

#### ■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

##### License

In some positions, a valid California class C driver's license, which must be maintained throughout employment is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own vehicle.

##### Certification/Registration

Retirement Member Services Clerk and Retirement Member Services Associate: An original unaltered typing certificate (no photocopies) for at least 30 net words per minute with a maximum of 5 errors. The typing test must be for at least five minutes with 2 gross words penalty for each error, and the certificate must be no more than 2 years old. The certificate must state the gross words per minute attained and the number of errors.

##### Working Conditions

Office environment; exposure to computer screens.

#### Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

#### Probationary Period

Incumbents appointed to permanent positions in these classes shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

**New: July 28, 2000**  
**Revised: March 3, 2004**  
**Revised: June 9, 2004**  
**Revised: October 1, 2004**  
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